IBM

The concept of Individual Customer Engineering Territory Management

What is this concept?
Successful territory management is ... to have and exercise the authority,
accountability and responsibility necessary to insure a smooth running
successful territory operation.

Isn't this the concept I have always held in operating my territory?
To a degree, we have all tried to operate under this concept, however, the
tools to fully operate as a successful territory manager have not been available.

What tools will I now receive?
1. Mechanism code report: time distribution by product by mechanism.
A monthly report showing a breakdown of the previous month's calls showing
total calls and total time spent on mechanisms by product. In cases where
the processing center's equipment can provide it, this report will also show
average actual time per mechanism by product.
2. MSPR report: the time distribution by product by service code. You will
receive this report monthly, which is a breakdown of the previous month's
calls, showing the time distribution and number of calls by service code
by product.
3. Assistance received and rendered: a monthly listing of assistance rendered,
showing time, number of calls, and territories where this assistance was given
and also the total amount of assistance that you have received.

IBM

CE **JOHN DOE** **201**

ET Customer Engineering Activity Report

Electric Typewriter Division

Individual Evaluation by CE

JANUARY Month | **Monthly Summary & Parts Recovery** **479** B/O No. | Service Required by Serial _____ | MSPR by CE _____ Mech. Code **X** Rec'd/Rendered ___

CUSTOMER INVOICE NO.	IBM DEPT.	C L O A C S S	MODEL	SERIAL	SVC. CD.	NUMBER CALLS	MEC CD.	TRAVEL HRS.	TOTAL HRS.	OVERTIME HRS.	EXPENSE	NON-BILLABLE RECOVERABLE PTS.	NON-BILLABLE TYPE-ELEMENTS	BILLABLE LABOR AMT.	OTHER TERR. WKD.	OTHER OFF. WKD.	TERR. ASGD.	DATE	CE SERIAL	AVG. TIME PER CALL
			1			22	01	4.6	13.8											.42
			1			4	02	2.6	4.8											.55
			1			31	03	4.4	19.9											.50
			1			13	06	2.6	8.4											.45
			1			4	10	.6	1.8											.30
			1			25	11	2.6	12.9											.41
			1																	
			6			1	78	.4	1.2											.8
			7			12	01	1.6	10.4											.73
			7			10	11	2.1	7.6											.55
			7			16	21	2.2	16.8											.91
			7			4	22	.6	2.6											.50
			7			25	23	4.6	24.2											.78

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IBM

Electric Typewriter Division

CE JOHN DOE 201

ET Customer Engineering Activity Report

Individual Evaluation by CE

JANUARY — Month

Monthly Summary & Parts Recovery 479 B/O No.

Service Required by Serial _____ MSPR by CE X Mech. Code _____ Rec'd/Rendered ___

CUSTOMER INVOICE NO.	IBM DEPT.	LOC	CLASS	MODEL	SERIAL	SVC. CD.	NUMBER CALLS	MEC CD.	TRAVEL HRS.	TOTAL HRS.	OVERTIME HRS.	EXPENSE	NON-BILLABLE RECOVERABLE PTS.	NON-BILLABLE TYPE-ELEMENTS	BILLABLE LABOR AMT.	OTHER TERR. WKD.	OTHER OFF. WKD.	TERR. ASGD.	DATE	CE SERIAL	AVG. TIME PER CALL
		1		1		01	11		2.2	8.2											
						03	3		.5	2.0											
						07	62		8.2	41.6											
						09	90		12.6	63.0											
						12	8		.9	4.8											
						32	8		1.4	4.3											
						12															
		1		7		01	4		1.2	3.2											
						07	10		1.1	5.0											
						09	12		.6	7.2											
						12	3		.4	1.5											
						32	4		.6	2.4											
		2		1		05	3		.1	1.5											
						47	2			1.0											
		5				07	3		.6	2.1											
		9				75	2			2.4											
		9				83	1			4.0											
									TOTAL	160.0											

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IBM

Electric Typewriter Division

CE **JOHN DOE** 201

ET Customer Engineering Activity Report

__JANUARY__
Month

Monthly Summary & Parts Recovery __479__ B/O No.

Service Required by Serial _____

Individual Evaluation by CE

MSPR by CE _____ Mech. Code _____ Rec'd/Rendered X

CUSTOMER INVOICE NO.	IBM DEPT.	LOC	CLASS	MODEL	SERIAL	SVC. CD.	NUMBER CALLS	MEC CD.	TRAVEL HRS.	TOTAL HRS.	OVERTIME HRS.	EXPENSE	NON-BILLABLE RECOVERABLE PTS.	NON-BILLABLE TYPE-ELEMENTS	BILLABLE LABOR AMT	OTHER TERR. WKD.	OTHER OFF. WKD.	TERR. ASGD	DATE	CE SERIAL	AVG. TIME PER CALL
							3		1.8	2.9		140				202				550850	
							4		.9	3.2		100				203				550850	
							6		1.1	4.0		80				206				550850	
					TOTALS		13		3.8	10.1		320									
							10		1.2	8.0		140				201				123456	
							1		.2	1.0		10				201				146987	
					TOTALS		11		1.4	9.0		150									

4. Complete territory list: you will receive this accurate listing every three months. This will be alphabetical by customer of all equipment in your territory. It will also show the total of all installed equipment by product by status, the monthly inspection workload distribution, and the correct individual annual billing amount for all of your M/A machines.
5. High service units report: weekly listing of all machines in your territory that in the previous week have received three or more calls in the past 60 days.

IBM Electric Typewriter Division

BRANCH OFFICE __479__ ZONE _____ TERRITORY __201__ DATE __JANUARY__

Equipment Installed

INST.	STATUS	CUSTOMER	LOCATION	CUSTOMER NUMBER	PROD CD.	MODEL	SERIAL	BL MO.	YR. MFG.	BL. AMT.	CE TERR.	DIS CD	SP EQP	INSP SCHEDULE	ZONE	DATE INST	BR. OFF. USE
	4	AMERICAN COUNCIL	305 E. 43 STREET		6	214	109361	12		3100		1		3-7-11			
	4	AMERICAN COUNCIL	305 E. 43 STREET		6	212	113537	12		2850		1		3-7-11			
	4	AMERICAN COUNCIL	305 E. 43 STREET		1	11	640334	12		6000		1	8	3-7-11			
	4	AMERICAN COUNCIL	305 E. 43 STREET		1	11	665537	12		6000		1	8	3-7-11			
	4	AMERICAN COUNCIL	305 E. 43 STREET		1	81	1567601	12		3500		1		4-8-12			
	4	AMERICAN COUNCIL	305 E. 43 STREET		1	81	1567602	12		3500		1		3-7-11			
	4	AMERICAN COUNCIL	305 E. 43 STREET		2	721	4044832	12		3500		1		3-7-11			
	4	AMERICAN COUNCIL	305 E. 43 STREET		2	721	4056241	12		3500		1		3-7-11			
	4	AMERICAN COUNCIL	305 E. 43 STREET		2	725	4355621	12		3500		1		3-7-11			
	4	AMERICAN COUNCIL	305 E. 43 STREET		2	725	4362621	12		3500		1		3-7-11			
	4	CARNEGIE ENDOWMENT	345 E. 46 STREET		1	41	50848	7		3950				2-6-10			
	4	CARNEGIE ENDOWMENT	345 E. 46 STREET		1	11	128441	7		3500				2-6-10			
	4	CARNEGIE ENDOWMENT	345 E. 46 STREET		1	11	172513	7		3500				2-6-10			
	4	CARNEGIE ENDOWMENT	345 E. 46 STREET		1	11	331844	7		3500				2-6-10			
	4	CARNEGIE ENDOWMENT	345 E. 46 STREET		1	11	429338	7		3500				2-6-10			
	4	CARNEGIE ENDOWMENT	345 E. 46 STREET		1	11	430536	7		3500				2-6-10			
	4	CARNEGIE ENDOWMENT	345 E. 46 STREET		1	81	1272711	7		3500				2-6-10			
	4	CARNEGIE ENDOWMENT	345 E. 46 STREET		1	41	2092567	7		3950				2-6-10			
	5	CARNEGIE ENDOWMENT	345 E. 46 STREET		1	41	2103069										
	4	CARNEGIE ENDOWMENT	345 E. 46 STREET		1	41	2142658	7		3950				2-6-10			

	TOTAL	WARRANTY	M/A	PER CALL	SELF SERVICE	SCHEDULE A	B	C		%/A
ET	533	12	440	81	16	116	104	118	102	84.4
DE	50	0	42	8	-	11	14	9	8	84.0
SE	33	3	24	6	-	6	4	8	6	80.0
TOTAL	616	15	506	95	16	133	122	135	116	

IBM Electric Typewriter Division

FOR _____
FIELD MGR., TERR. SUPERVISOR

WEEK ENDING __March 7, 1964__

_479_
BRANCH OFFICE

High Service Units Report

CUST. ENG.	CUSTOMER	MODEL	SERIAL	SVR CD	NO. CLS.	ACTION	DATE
	American Council	214	0109361	12	3		
	Haskin Lab	11	0457272	07	4		
John Doe	Fred Keck Company	11	0102049	07	3		
	Foreign Policy	41	2095651	12	3		
	United Community Fnd.	81	1111245	01	3		
	S. H. Winters	725	4374068	07	4		

You mentioned an accurate territory list. Is this possible? Hell no!
Yes! With the use of the permanent change request page in the new call
record book, an auditable control and responsibility can now be applied to
territory list change requests, insuring an accurate list.

How can I use these reports to successfully manage my territory?
Good question! Just supplying each of you with these reports will not make
you a successful territory manager. It is the use you make of them that will
determine how successful a territory manager you will become.

- Let us look at the complete territory listing.

Besides giving you and your manager the total number of machines by
status for which you are responsible, this report will be the means of
establishing a balanced inspection workload, and also to insure that machines
are scheduled by customer to make the most efficient use of inspection time.
An example of this would be a 10 machine M/A account where one machine
was on a different inspection schedule than the others. An efficient operation
demands that in this case all inspection schedules be the same. Also, a similar
situation where in a 10 machine account 9 are on M/A and one is on per call.
There may be a logical reason for this, but it could be an oversight and
follow-up is necessary.

The territory list will also show the exact M/A charge for each machine on M/A. This will enable you to check this charge against the machine specifications to insure correct M/A billing charges.

In summary, correct use of this list will show and insure the most efficient inspection scheduling, per call machines that are potential M/A machines and the maximum financial return from Maintenance Agreements.

• The time distribution by product by service code report will show your 07-09 time relationship, code 32 activity. 83 and 85 time and your 01-37 time.

Getting this report monthly will allow you to develop time trends, showing areas where improvement has been made, and areas where improvement is necessary. Average actual 09 time per inspection can be calculated and will show whether enough 09 time is being spent per inspection, and also if you feel the inspection you are doing justifies the time being spent.

• The time distribution by product by mechanism will show you what mechanism you are spending your time on. High time mechanism can be analyzed by you to determine whether the time is high because you are doing a quality job, or because of your lack of understanding of the mechanical workings and adjustments. In the future, national actual time per mechanism averages can be established. Then you can see month to month not only your own trends, but also how you compare to the national averages.

• The assistance received and rendered report will allow you to evaluate your territory in regards to workload. If you have a good territory operation and are continually rendering more assistance than receiving, your territory can be increased, or proper credit given you. If the reverse is true and you are receiving more assistance than you are giving, it would indicate your territory workload is too great, and a territory decrease is necessary.

• The high service unit report is a weekly recap from your previous week's call record book. It lists all machines that have had three or more calls in the past 60 days. Although your CE Manager has the ultimate responsibility for complete customer satisfaction for service, you as the CE and a Territory Manager have a responsibility also. For this reason, this report will be furnished to both you and management.

Your personal knowledge of each situation can then be given to your manager to assist him in making a proper evaluation and decision. The proper use of this report will insure a territory with a high degree of customer satisfaction, and will reflect your territory management ability.

You have to bear in mind that the recommendations made here for the use of these tools are basic. We are certain that lots of you will find additional uses to which you as individuals will put these tools to work.

Sounds good!!
This concept presents a new challenge to my job as a Customer Engineer.
A challenge that is welcome, stimulating and obviously rewarding. I feel that
I am going to become the successful Territory Manager.

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